

## Introduction

The “How to Maintain Organizations/Departments/Locations” Quick Reference Guide is designed to provide Organization Administrators the minimum steps necessary to maintaining their Organization.

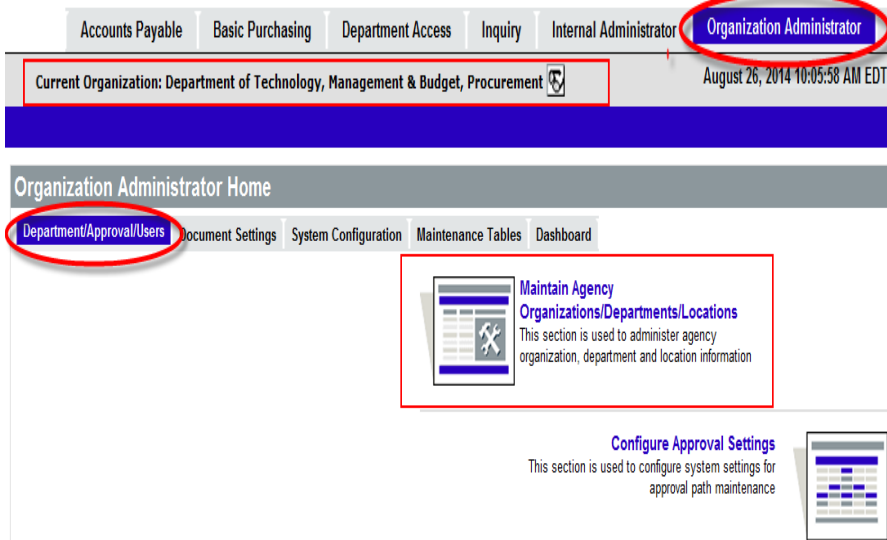
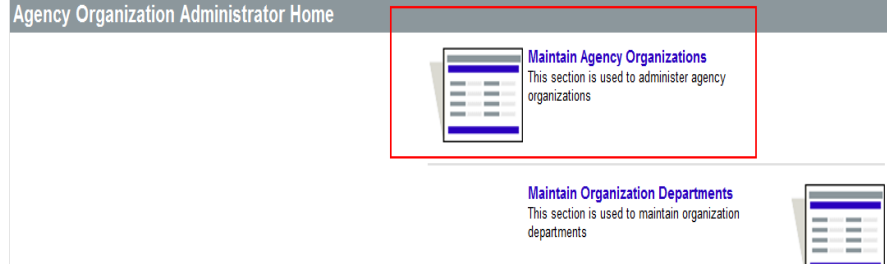
There are **three levels** to maintaining organization in Buy4Michigan which is described in this QRG. Within each Organization, you can maintain a number of **Departments**, which are the second tier of the organization structure. Departments are used to restrict how users can access certain information (bill to/ship to addresses & what documents they can see). **Locations** are the lowest level of the organization structure – typically used for managing approval paths, defaults addresses & Purchaser assignment.

**Note:** If you are an Org. Admin. for more than one Organization, you can select which organization to maintain by clicking the eyeglass lookup at the top of the screen.

## Pre-requisites

You must have the Organization Administrator Role.

## Steps

<p><b>Step 1:</b></p> <p>a.) From the home screen once logged in, select the <b>Organization Administrator</b> tab.</p> <p>The <b>Organization Administrator Home</b> page displays, defaulted to the Department/Approval/Users tab.</p> <p>b.) Click on the <b>Maintain Agency Organizations/Department/Locations</b> icon.</p>	
<p><b>Step 2:</b></p> <p>a.) Click the <b>Maintain Agency Organizations</b> icon.</p>	

**Step 3:**

The **Maintain Organization** page displays.

- a.) To Add a new Organization, click on the **Add Organization** button.
- b.) To Edit an Organization, click the **Organization ID** link to your left.

**Maintain Organization**

Organization ID	Organization Name	Fiscal Year Start	Fiscal Year End
<a href="#">0071</a>	Department of Technology, Management & Budget, Procurement	10/01/2013	09/30/2014

**Add Organization** **Exit**

**Step 4:**

The **Add Organization** screen displays, defaulted to the **General** Tab.

- a.) Fill out ALL required and necessary fields to properly add your Organization.

**Notes:**

- Org. ID – up to 5 characters.
- FY Start & End – Dates that will affect documents & accounting.
- FY Roll Days – the number of days users may start to build documents for the NEXT FY & the amount of time after FY roll to complete previous year.
- Limit Doc. Access for DA Users – if checked, the DA user can only see documents for their department.

Once saved, this info. cannot be changed – is this true?

**Add Organization**

**General** Account Interface

Organization ID\*:

Organization Name\*:

Organization Label\*:

Fiscal Year Start\* (MM/DD/YYYY):

Fiscal Year End\* (MM/DD/YYYY):

Fiscal Year Roll Days:

Alternate ID:

Print Logo  **Browse...**

Status:

Address 1\*:

☐ Limit account access for Department Access users (If checked, Department Access users can only access accounts based on department/location privileges.)

☒ Limit document access for Department Access users (If checked, Department Access users can only access documents based on department/location privileges.)

☐ Limit Solicitation access for external users (If checked, all Solicitations associated to this Organization will be filtered out of external searches.)

☐ Limit Contract access for external users (If checked, all Contracts associated to this Organization will be filtered out of external searches.)

☐ Restrict Department Access users from publishing Informal Bids to Web.

☐ Restrict Inventory users from publishing Informal Quotes to Web.

P-Card Bill-to Address

**Save & Exit** **Save & Continue** **Reset** **Exit**

**Step 5:**

The **NEXT step** is to maintain **Departments**.

- a.) Return back to the **Agency Org. Administrator Home** page by clicking the **Exit** button.
- b.) Click the **Maintain Organization Departments** icon. This will give you the ability to add or edit a department.

**Note:** Within each Org. you can maintain a number of Depts. Depts. are used to restrict how users can access certain info:

- What bill-to/ship-to addresses they can use.
- What documents they can see (restricted documents).

Agency Organization Administrator Home



**Maintain Agency Organizations**  
This section is used to administer agency organizations



**Maintain Organization Departments**  
This section is used to maintain organization departments

**Step 6**

The **Department Maintenance** page displays.

- a.) To Add a new Department click the **Add Department button**.
- b.) Fill out ALL required and necessary fields.

Department Maintenance for: Department of Technology Management and Budget

Department ID	Department Name
<a href="#">1TEST</a>	Testing
<a href="#">51979</a>	Test Yard Equipment
<a href="#">6412000</a>	Purchasing

Add Department

Exit

Add Department

Department Information

Department ID*:	<input type="text"/>	Organization	AGENCY - Department of Techno
Department Name*	<input type="text"/>	Status	Active
Allow Manual Override Encumbrance #	<input type="checkbox"/>	Auto Encumbrance # Prefix	<input type="text"/>
Alternate ID			
Limit Solicitation access for external users (If checked, all Solicitations associated to this Organization will be filtered out of external searches.) <input type="checkbox"/>			
Limit Contract access for external users (If checked, all Contracts associated to this Organization will be filtered out of external searches.) <input type="checkbox"/>			
Save & Exit		Save & Continue	
Reset		Exit	

**Step 7**

- a.) To Edit a current Department, click the **Department ID link** to your left.
- b.) Click the **Add Dept. Address** button to add a new Dept. Address OR click the Dept.ID link to edit current information.
- c.) Click the **Add Location** button to add a new Location or click the **Location ID link** to edit current information.

Department Maintenance for: Department of Technology Management and Budget

Department ID	Department Name
<a href="#">1TEST</a>	Testing
<a href="#">51979</a>	Test Yard Equipment

Maintain Department for: DTMB - Procurement

Department Information

Department ID:	1411	Organization	0071 - Department
Department Name*	DTMB - Procurement	Status	Active
Allow Manual Override Encumbrance #	<input type="checkbox"/>	Auto Encumbrance # Prefix	<input type="text"/>
Alternate ID			
Limit Solicitation access for external users (If checked, all Solicitations associated to this Organization will be filtered out of external searches.) <input type="checkbox"/>			
Limit Contract access for external users (If checked, all Contracts associated to this Organization will be filtered out of external searches.) <input type="checkbox"/>			
Save & Exit		Save & Continue	Reset

Department Address List

Department Suffix ID	Department Suffix Name	Address Info	Status
<a href="#">12345</a>	123456789@123456789*123456789#123456789\$123456789&123456789-123456789/123456789*	test for field length how long allowed lansing, MI 48901 US Email: test@michigan.gov Phone: (517)123-4567	Active

Add Dept Address

Location List

Location ID	Location Name	Status
<a href="#">321</a>	office	Active

Add Location

Exit